

Data Backup

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Data Backup is used to export your Managely data.

To export data:

1. Select a date range.
2. Click the Export button.
3. At the message "Are you sure you want to export?" click Yes.
4. When the data export is finished, a Download button appears beside the Export button.
5. Click Download to download the data within the date range as a ZIP file.

This ZIP file contains folders for Accounts Receivable, Accounts Payable, Setup, and Documents (If there is not data in one of these areas, there is no folder. For example, if there were no documents exported, there is no documents folder.) In each folder, there is a spreadsheet for the type of data (for example, Employees, Items, Parts, and Sales Tax Codes).

Data Backup

Export Since 3/15/2022 - 8/8/2022

Data backup lets you create an export of your Managely data. The sections below will be exported by clicking the "Export Data" button. It will export all new records since your last export.

Accounts Receivable <ul style="list-style-type: none">✓ Customer✓ Sites✓ Systems (Parts)✓ Payments✓ Deposits✓ Work Orders (Items, Parts)✓ Appointments✓ Proposals (Items, Parts)✓ Invoices (Items, Parts, Sales Tax Records)	Accounts Payable <ul style="list-style-type: none">✓ Vendors✓ Bills (Items, Parts)✓ Payments✓ Purchase Orders (Items, Parts)
Setup <ul style="list-style-type: none">✓ Employees✓ Items✓ Parts✓ Sales Tax Codes	Documents <ul style="list-style-type: none">✓ Customer✓ Sites✓ Systems✓ Work Orders✓ Proposals✓ Vendors